

# CCBHC-E National Training and Technical Assistance Center

*CCBHC Foundations Data Learning Series*  
*Session 2*

December 13, 2022

**CCBHC-E National Training and Technical Assistance Center**

Funded by Substance Abuse and Mental Health Services Administration and operated by the National Council for Mental Wellbeing

# Today's Objectives

- Review key points from Session 1
- Explore techniques and strategies to build organizational infrastructure for grant data requirements
- Introduce strategies and tools to design processes and workflows for data collection, analysis, and reporting
- Showcase and explore how data can be used to guide agency-wide continuous quality improvement



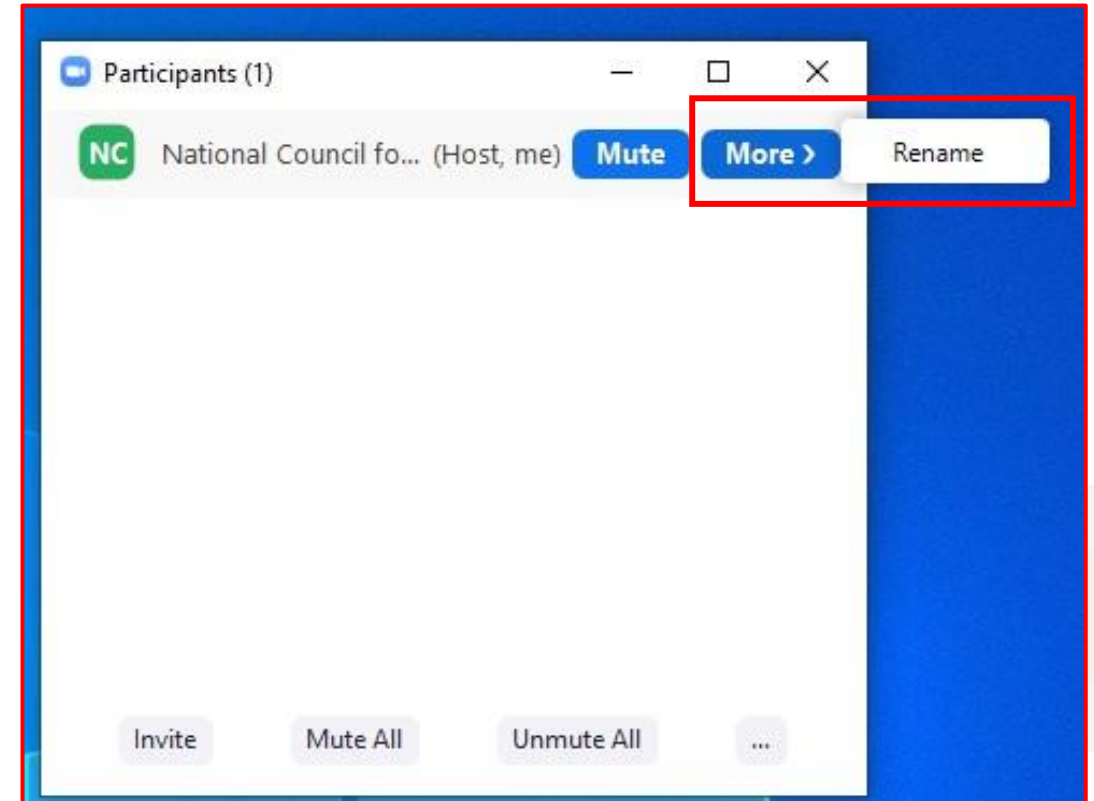
# Acknowledgements and Disclaimer

*This session was made possible by Grant Number 1H79SM085856 from the Substance Abuse and Mental Health Services Administration (SAMHSA). Its contents are solely the responsibility of the authors and do not necessarily represent the official views, opinions, or policies of SAMHSA, or the U.S. Department of Health and Human Services (HHS).*



# Logistics

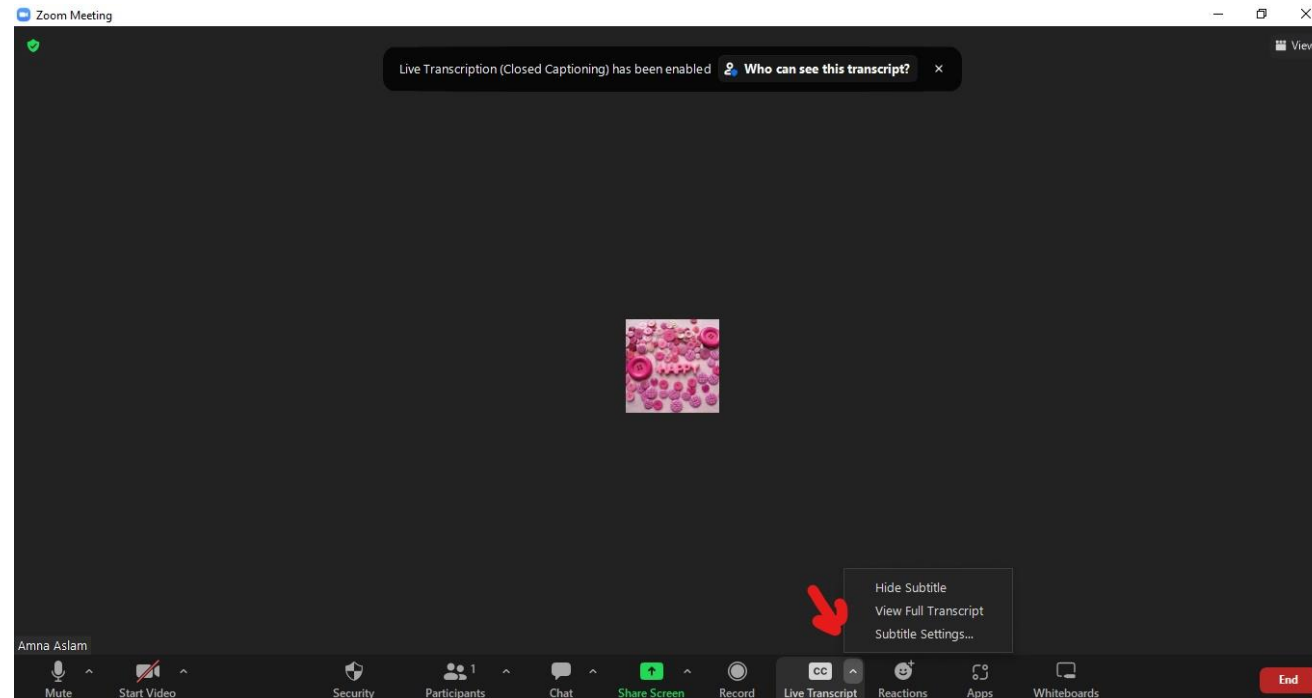
- Please rename yourself so your name includes your organization.
  - *For example:*
    - **Blaire Thomas, National Council**
  - *To rename yourself:*
    - Click on the **Participants** icon at the bottom of the screen
    - Find your name and hover your mouse over it
    - Click **Rename**
- If you are having any issues, please send a Zoom chat message to **Kathryn Catamura, National Council**



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# How to Enable Closed Captions (Live Transcript)

Next to “Live Transcript,” click the arrow button for options on closed captioning and live transcript.



# Today's Session: Slides and Recording

Slides and the session recording link will be available on the [CCBHC-E NTTAC website](#) under “Training and Events” > “Past Events” within 2 business days.

The screenshot displays the website interface for the CCBHC-E National Training and Technical Assistance Center. On the left, a navigation menu lists 'About Us', 'Resources', 'Training & Events' (highlighted with a red arrow), 'Learning Communities', 'On-Demand Modules/Lessons', 'Learning and Action Series', and 'Request Training/Assistance'. The main content area is titled 'Calendar of Events' and includes search filters for 'Search', 'Start Date', 'End Date', and 'Select Event'. A dropdown menu is open, showing 'Future Events' and 'Past Events' (highlighted in blue with a red arrow). Below the dropdown is an 'Apply' button. The page also features a 'Relias' sidebar and a 'Relias First National T' section.

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# Today's Agenda



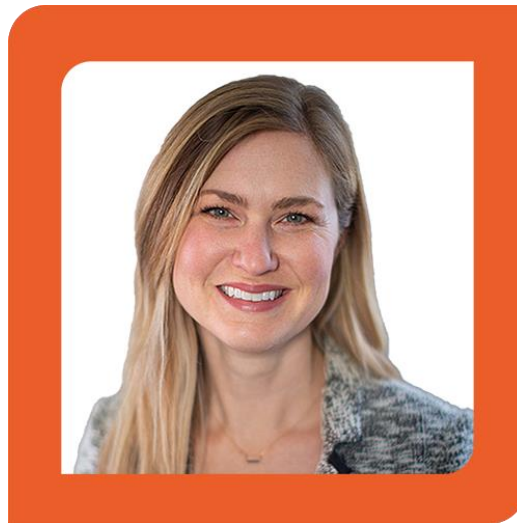
- Map of Participants
- Session 1 recap
- Establishing a Data Infrastructure Case Example
- Sharing and preparing for next session



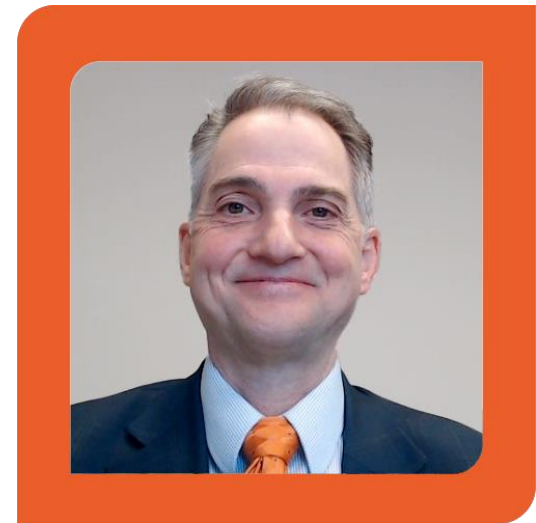
# Today's Presenters



Jesse Sieger-Walls, MSW, LCSW, PhD  
Principal and Director of  
Population Health, TriWest Group



Leigh Fischer, MPH  
Principal, TriWest Group



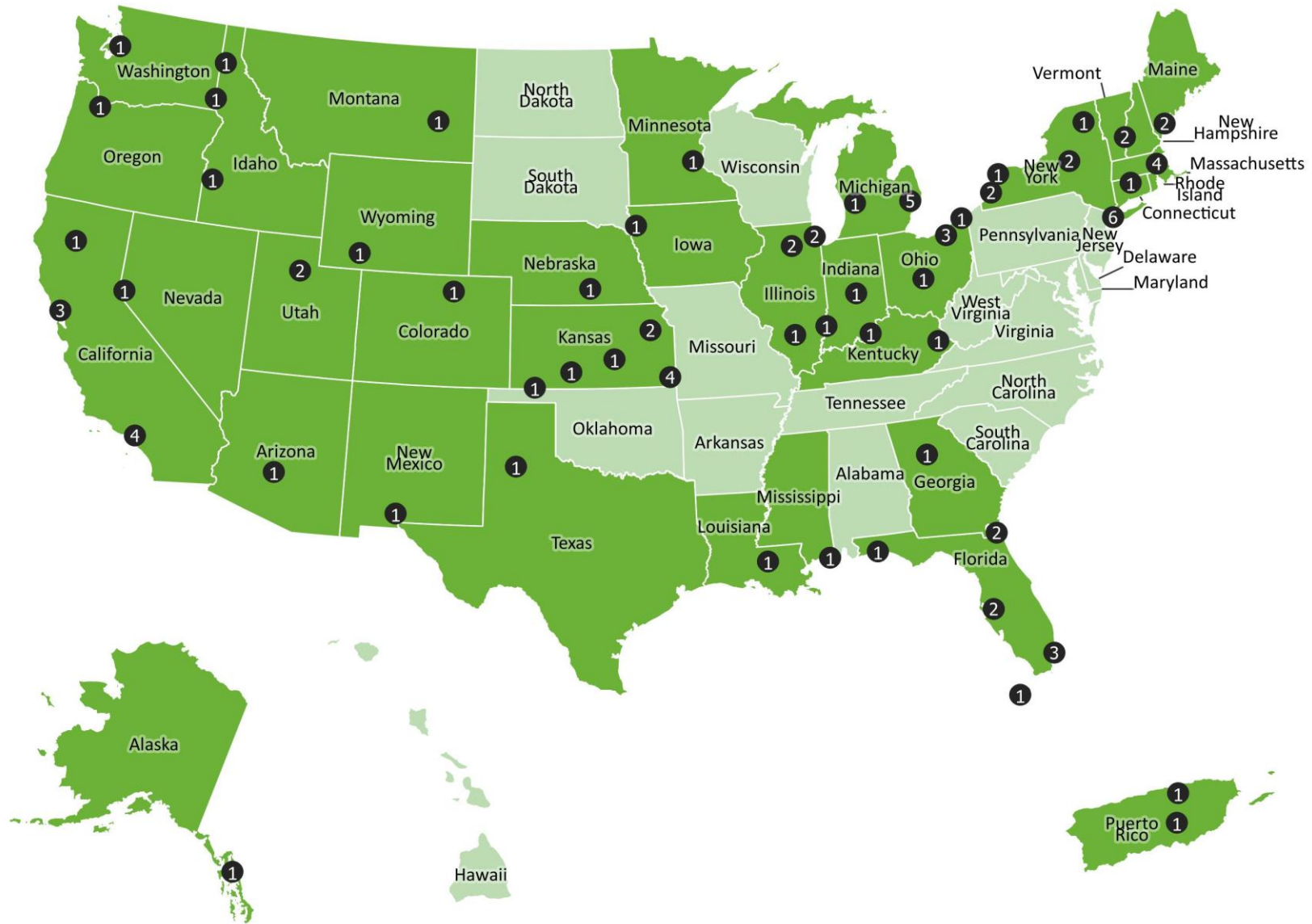
Todd Reckling, MPA  
Director, Integrated Health  
Services, Community Alliance



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# Participants' Electronic Health Records

- Credible
- myAvatar
- Epic
- CareLogic
- myEvolv
- SmartCare
- NextGen
- Other



# Learning Series Curriculum

Month	Topic
Nov 2022	Orientation and Attestation
Dec 2022	Building Infrastructure for Data Collection, Analysis, Reporting, and Continuous Quality Improvement
Jan 2023	Designing an Effective Community Needs Assessment
Feb 2023	Building Infrastructure and Practices for NOMs Data Collection, Analysis, and Reporting
Mar 2023	Building Infrastructure for Population Health Management and Risk Stratification
Apr 2023	Review and Wrap-Up



# Session 1 Recap: Purpose of Evaluation

- Account for whether the program is working as intended
- Identify areas in need for improvement
- Support short- and long-term planning (staffing needs, business decisions, etc.)
- Inform organizational, local, and/or state policy change
- Communicate results and promote programs and services
- **Celebrate progress and successes!**

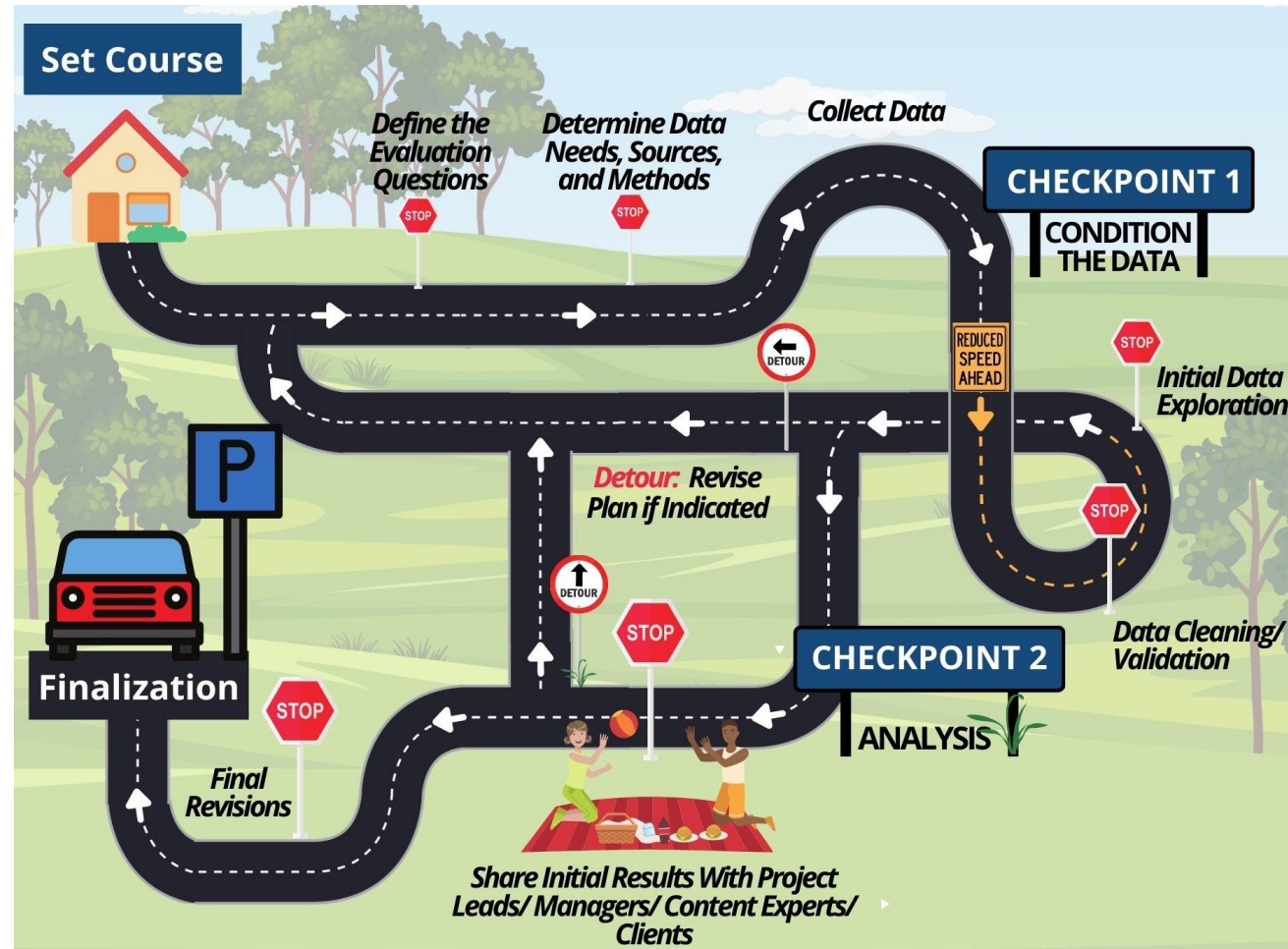


# Session 1 Recap: Principles of Data Collection

- Respect individuals' rights, dignity, privacy, and autonomy
- Use culturally responsive practices
- Minimize undue burden
- Collect, use, and disclose data for meaningful purposes
- Store and transmit data through secure methods
- Ensure data collected are reliable and valid



# Data-Driven Project Roadmap



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# Steps to Establishing a Data Infrastructure

1. Identify your data team members and other interested parties. Establish roles.
2. Define evaluation questions
3. Determine data needs and sources
4. Develop data collection methods
5. Draft a plan and workflows/protocols for data collection and analysis
6. Pilot workflows and identify areas for improvement as needed



# Step 1: Identify Team Members

- Identify a data champion (e.g., CCBHC Project Director, Evaluator, Quality Improvement Director)
- Establish a team committed to data collection, analysis, and reporting, including consumers/peers/family members
- Map grant data requirements
  - Notice of Award
  - SAMHSA website
  - SPARS resources
  - Other synchronous and competing data collection and reporting demands
- Build buy-in for the data infrastructure with executive leadership, departmental leads, and program managers





# Step 2: Define Evaluation Questions

- With the team, discuss the purpose of the evaluation and how the results will be used
- Review your CCBHC goals and objectives
- Develop questions specific to your CCBHC
- Organize according to domains and types
  - Formative
  - Process
  - Outcomes (i.e., summative)
- Prioritize questions based on relevance and available resources



# Examples of Evaluation Questions

Type	Question	Data Source
Process	<ul style="list-style-type: none"><li>What are the barriers (<i>structural, financial, personal</i>) to accessing CCBHC services?</li><li>To what extent has the population of focus initiated and engaged in the recommended services?</li></ul>	Attendance/administrative data  Surveys/interviews of providers and program participants  NOMs
Quality	<ul style="list-style-type: none"><li>What is the program's impact on the quality of behavioral health care?</li><li>To what degree are evidence-based practices implemented as intended?</li><li>What are barriers and facilitators to implementing the CCBHC required services?</li></ul>	Surveys/interviews of providers and program participants  Fidelity checklists
Outcomes	<ul style="list-style-type: none"><li>To what extent has the client's quality of life improved as a result of the program?</li><li>Was there a reduction in severity of mental health concerns?</li></ul>	Client self-reported qualitative data  Standardized scales



# Step 3: Determine Data Needs and Sources

- Discuss what data you need to answer your evaluation questions (i.e., *indicators*)
- Review data sources and strengthen where needed
- Identify new data sources
- Integrate or link data from different systems while assuring client privacy
- Ensure underserved populations are represented in your data



# Step 4: Develop Data Collection Methods

- Identify methods for gathering the data needed
- Determine whether the methods are appropriate and equitable
- Promote methods that are minimally burdensome on clients and staff
- Develop data collection tools if needed



# Step 5: Draft a Data Plan and Workflows

- Determine how data will be collected and analyzed
- Determine when data will be collected and analyzed (i.e., schedule and frequency)
- Develop a process for receiving informed consent from program participants
- Designate roles and responsibilities for each aspect of the data collection, analysis, and reporting process
- Include a plan for sharing data with others to gain context and interpret results



# Example Plan

Evaluation Question	Indicator	Method	Data Source	Frequency	Responsible Person(s)
Has the CCBHC helped improve housing stability?	Percentage of enrolled clients with unstable housing at baseline reporting stable housing at follow-up	Descriptive analysis NOMs question B.2	NOMs	First 6 months of enrollment	Evaluation Lead
	Percentage of all clients with unstable housing at intake reporting stable housing at follow-up	Descriptive analysis of client records indicating housing status	EHR	90 days	CQI Lead



# Step 6: Pilot and Refine Workflows

- Pilot your workflow to identify potential barriers and effective strategies
- Perform data reliability and validity tests where necessary (e.g., routinely check in with people responsible for data collection)
- Provide training and re-training as needed



# Case Example: Using Data To Inform CQI



## Community Alliance





# Community Alliance CCBHC Overview

- Description of Community Alliance
- Population of focus for CCBHC
- Summary of CCBHC goals
- CCBHC evaluation questions
- Data needs and sources





Omaha, Nebraska  
CCBHC Service Area:  
Sarpy and Douglas counties  
Population: 692,197

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# Community Alliance CCBHC Data Infrastructure

- Established a strong team across agency departments: CQI, IT, and programs
- Utilized SmartCare for EHR and dashboarding technology
- Applied grant-required data from multiple programs to inform services
- Integrated CCBHC quality metrics into clinical outcome measures and quality assurance plan
- Identified how to extract data to measure quality and outcomes



# Data Collection Workflow

- Care coordinators collect baseline NOMs
- Grant program assistant enters NOMs into SPARs
- Project director and evaluator review the data
- Data are discussed across agency teams to monitor progress, identify opportunities for improvement, and inform decisions
  - Team huddles
  - Biweekly integrated care team meetings
  - Biweekly implementation team meetings
  - Monthly CQI/IT team reports
- Data are shared with the board of directors



# Example: Improving Blood Pressure Control

- Identify evaluation question
- Determine indicators, data source, and methods
- Consider clinical pathways to bolster health outcomes and target those approaches
  - Implement a team-based, integrated care approach- EHR incorporates mental health, substance use, and primary care records
  - Challenge the team- how are you asking questions; what education are you providing?
- Monitor data and use data to improve



# Lessons Learned

- Emphasize a team approach from the beginning to build and maintain momentum
- Share responsibility for improving client outcomes across team members and departments
- Routinely review data to identify trends and potential training/retraining needs (e.g., decline in reassessments)
- Find the 'golden nuggets' in the data and use them to create change in processes and practices (e.g., Plan-Do-Study-Act)
- Anticipate complexity when working with partners and DCOs



# Breakouts: Sharing With Your Peers



In each room, have each participant share:

- Who you are: name, organization, role in CCBHC implementation
- Share an example of an evaluation question for your CCBHC. Discuss how you will answer the question (i.e., what data will you use; who and how will data be collected; how will you use the data to measure progress or improve performance and outcomes?)

**Be prepared to share some themes from your group!**



# Closing: Sharing and Preparing



- **Volunteers:** What did you hear from others in terms of questions and ideas?
- **Question Log:** Take 2–3 minutes to put any questions you have about the learning series curriculum in the chat
- **Next Session: January 17, 2022, 3–4:30pm EST**
  - Topic: Designing an Effective Community Needs Assessment
  - Prep work: Draft a list of (1) data sources and (2) quantitative and qualitative methods you will use to inform your community needs assessments.







Collaboration with  
Other Grantees

# Collaboration with Other Grantees

- Peer cohort calls as a regular standing space for engaging with others going through the same things as you:
  - CCBHC-E **executives** meet the last Friday of each month from 12-1 p.m. ET. [Register here](#).
  - CCBHC-E **program directors** meet the first Wednesday of each month from 12-1 p.m. ET. [Register here](#).
  - CCBHC-E **evaluators or CQI leads** meet the first Tuesday of each month from 3:30-4:30 p.m. ET. [Register here](#).
  - CCBHC-E **medical directors** meet the first Monday of each month from 12-1:00 p.m. ET. [Register here](#).
- **Additional Support:** We welcome you all to join our virtual community where you can communicate with your peers, post questions, comments and share resources amongst the cohort! [JOIN HERE!](#)



# Thank You!


Thank you for attending today’s event.


Slides and the session recording link will be available on the CCBHC-E NTTAC website under “Training and Events” > “Past Events” within 2 business days.


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